<table>
<thead>
<tr>
<th><strong>Title</strong></th>
<th>Atlas Project Management Module User’s Guide 2.0</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Language</strong></td>
<td>English</td>
</tr>
<tr>
<td><strong>Responsible Unit</strong></td>
<td>Bureau of Management – Office of Information Management and Technology</td>
</tr>
<tr>
<td><strong>Creator (individual)</strong></td>
<td>Yazan Musharbash, <a href="mailto:yazan.musharbash@undp.org">yazan.musharbash@undp.org</a></td>
</tr>
<tr>
<td><strong>Subject (Taxonomy)</strong></td>
<td>Project Management User’s Guide</td>
</tr>
<tr>
<td><strong>Date created</strong></td>
<td>December 2018</td>
</tr>
<tr>
<td><strong>Audience</strong></td>
<td>All country offices. Primarily intended for staff involved in programming, project formulation, project management, monitoring and evaluation.</td>
</tr>
<tr>
<td><strong>Applicability</strong></td>
<td>This user guide is applicable to all UNDP projects.</td>
</tr>
<tr>
<td><strong>Replaces</strong></td>
<td>Version 1.1 Issued on July 2012</td>
</tr>
<tr>
<td><strong>Related documents</strong></td>
<td>UNDP POPP – Programme and Project Management ERM Policy</td>
</tr>
<tr>
<td><strong>Document Location</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Version</strong></td>
<td>2.0 Created December 2018</td>
</tr>
<tr>
<td><strong>Reviewed By</strong></td>
<td>Jessica Murray; Momenat Al-Khateeb</td>
</tr>
</tbody>
</table>
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I. Introduction – Enhanced Atlas Project Management Module

With the new enhanced Project Management Module, the following benefits are expected from the changes introduced in the module:

- Improved user experience from simplified navigation and consistent use of programme terminology
- Simplified results data entry screens for outputs and activities (optional)
- Project Overview screen to provide snapshot of the whole project including HACT Monitoring.
- Improved data quality of GMS rates and distribution
- Searchable document repository in SharePoint
- Data capture of Total Approved Budget
- Ability to enter pipeline budgets
- Simplified project approval process replacing “Generate Award”
- Introduction of the Portfolio concept which will allow you to link Projects and facilitate the monitoring and tracking for those projects.

The new module will allow you to:

- Enter new Proposal to Atlas (Including Outputs, Budgets and Attachments)
- Approve the Proposal (Generate the Project)
- Set the GMS cost recovery method, Rate and Income Distribution
- Establish and update the Output Targets and Results based on the Result and Resource Framework (RRF)
- Establish and update the Activities plan results and assessment based on the Monitoring Framework and Evaluation
- Enter and update/follow-up the Project Monitoring and Communication Plan
- Enter, update and track the risks elements (Risks Log)
- Enter and Update the Output Gender Marker Attribute
- Upload attachments
- Perform budget revisions in a simplified process.
In this user guide, we will use one scenario to walk through the new enhanced Project Management Module using the below information:

**Scenario:** UNDP Jordan Country office prepared a new project document with the below basic details:

- **Project Title:** Youth Employment Promotion
- **Description:** This project has been developed to respond to escalating need to provide a tool addressing the unemployment challenge in Jordan.
- **Contributing CPD Outcome:** Increased communities (esp. women and youth) productivity, empowerment and participation in local development initiative
- **Indicative Output(s):** Youth Employment generation policies formulated through the provision of high-caliber advisory services to concerned public/private institutions.
- **Gender Marker:** GEN2
- **Duration:** Start Date 01-Jun-2018 and End Date 31-Dec-2019
- **Implementing Partner:** UNDP - Jordan
- **Donor:** Government of Japan
- **Total Resources:** US$100,000
- **GMS:** Earn-as-you-go (8%) 

### Project Result and Planning Framework:

<table>
<thead>
<tr>
<th>Expected output(s)</th>
<th>Output indicators</th>
<th>DATA SOURCE</th>
<th>Baseline</th>
<th>Target</th>
<th>DATA COLLECTION METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output 1: Youth participation at the local level empowered and recognized</td>
<td>1) Number of youth- supporting organizations participated in the conference at national level</td>
<td>Ministry of Youth</td>
<td>1) National Youth Strategy 2011-2015</td>
<td>Minimum 50% of Youth-supporting organizations, participated in the conference with equal representation of women and men.</td>
<td>Survey</td>
</tr>
<tr>
<td></td>
<td>2) Action Plan updated by the Youth Technical Assistance Committee</td>
<td>Media coverage</td>
<td>2) Current Employment Strategy and Action Plan</td>
<td>Priorities, gaps and technical requirements identified and discussed</td>
<td>Reports published by NGOs and Activist supported Technical Assistance Committee</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Output</th>
<th>Activity</th>
<th>Responsible Party</th>
<th>Budget Year 1</th>
<th>Budget Year 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth Employment Promotion</td>
<td>National Implementation Plan</td>
<td>Ministry of Youth</td>
<td>$20,100</td>
<td>$40,825</td>
</tr>
<tr>
<td>Youth Employment Policies</td>
<td>Ministry of Youth</td>
<td>$9,844</td>
<td>$9,231</td>
<td></td>
</tr>
<tr>
<td>Develop an interactive Youth Portal</td>
<td>UNDP</td>
<td>10,000</td>
<td>10,000</td>
<td></td>
</tr>
</tbody>
</table>
Please note the following:

➢ The Project in Atlas should mirror the Results and Planning Framework
➢ The outputs are not the same as the project, and there can be more than one output per project.

II. **Entering New Proposal**

**Navigation:** Atlas Main Menu > Grants > Project Management > Project Proposals
A. Entering the Project Proposal basic information:

<table>
<thead>
<tr>
<th>Project Proposal</th>
<th>Business Unit</th>
<th>JOR10 Jordan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Project Proposal ID</td>
<td>NEXT</td>
</tr>
<tr>
<td>Proposal Title</td>
<td>Youth Employment Promotion</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>This project has been developed to respond to escalating need to provide tool addressing the unemployment challenge in Jordan.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project Type</td>
<td>CNT</td>
</tr>
<tr>
<td></td>
<td>Project Manager</td>
<td>876146 MUSHRABASH, Yazan Isse Jamil</td>
</tr>
<tr>
<td></td>
<td>Sponsor</td>
<td>GOVERNMENT OF JAPAN</td>
</tr>
<tr>
<td></td>
<td>Managing Department</td>
<td>B01052 Jordan - Amman</td>
</tr>
<tr>
<td></td>
<td>Implementing Partner</td>
<td>999999 UNDP</td>
</tr>
<tr>
<td>Regular Resources</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Other Resources</td>
<td>100,000.00</td>
<td></td>
</tr>
<tr>
<td>Total Resources Required</td>
<td>100,000.00</td>
<td></td>
</tr>
<tr>
<td>Begin Date</td>
<td>01/06/2018</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>31/12/2019</td>
<td></td>
</tr>
</tbody>
</table>

Budget Period Schedule:

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01/06/2018</td>
<td>31/12/2018</td>
</tr>
<tr>
<td>2</td>
<td>01/01/2019</td>
<td>31/12/2019</td>
</tr>
</tbody>
</table>

Output ID: NEXT
Output Title: Youth Employment Promotion

Output Details:
- Short Description: Youth participation at the local level empowered and recognized

Activity ID: ACTIVITY1
Description: National Implementation Plan

Activity ID: ACTIVITY2
Description: Youth Employment Policies

Activity ID: ACTIVITY3
Description: Interactive Youth Portal

1. Enter the title
2. Enter the Description
3. Enter the Project type, PM, Sponsor and Implementing Partner
4. Enter the Required Resources
5. Enter the Begin and End Date
6. Enter Output Title
7. Enter the Short Description
8. Update the Department and IP if required
9. Enter the Activity ID and Description
10. Click + to add new Activity
11. Click Save
Once you save the Project Proposal the page will be updated as per below:

➢ Three new tabs will become available: 1. Budgets 2. Attachments 3. Maturity
➢ The proposal ID and Output ID will be generated
➢ Proposal Status will be changed to Draft
➢ Budget Periods will be automatically derived and scheduled
➢ Submit and Withdraw buttons will become available at the bottom of the page

NOTE: After saving the Project Proposal, proceed to the Budgets tab to enter the proposal budget. Entering proposal budgets to be captured as pipeline is critical for resource management.
B. Entering Proposal Budgets

Entering the Project Proposal budget can be done only if the Project Proposal Status is still draft. *(Click on the Budgets Tab to review the below page):*

Once you click on the **Budget Period hyperlink** the below screen is presented where you can enter the proposed budget *(Note: Make sure to enter the GMS line to the budget since it is part of the total cost of the project)*
Once the Budget Period is entered and you click on Save and Return you will be able to see the entries on the main page as per below.

**Please note that the same steps should be followed to enter the budget for each and every Budget Period.**

Once all periods are entered the budgets page will look as per the below; make sure that the total budgets entered matches the Total Resources Required.
### Business Unit
JOF10

### Project Proposal ID
00108461 Youth Employment Programme

This project has been developed to respond to escalating need to provide project addressing the unemployment challenge in Jordan.

### Begin Date
01/06/2018

### End Date
31/12/2019

### Total Resources Required
100,000.00

<table>
<thead>
<tr>
<th>Output ID</th>
<th>Description</th>
<th>Budgets By Period</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>00108289</td>
<td>Youth Employment Promotion</td>
<td>39,944.00</td>
<td>100,000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Description</th>
<th>Budgets By Period</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY1</td>
<td>National Implementation Plan</td>
<td>20,100.00</td>
<td>60,025.00</td>
</tr>
</tbody>
</table>

#### Budget Period 1

<table>
<thead>
<tr>
<th>Line</th>
<th>Budget Item</th>
<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>International Consultants</td>
<td></td>
<td>Government</td>
<td>6,000.00</td>
<td>Long Description</td>
</tr>
<tr>
<td>20</td>
<td>Travel</td>
<td></td>
<td>Government</td>
<td>2,000.00</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Information Technology Equip</td>
<td></td>
<td>Government</td>
<td>2,000.00</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Training, Workshops and Conference</td>
<td></td>
<td>Government</td>
<td>7,000.00</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>Miscellaneous Expenses</td>
<td></td>
<td>Government</td>
<td>1,611.11</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>F&amp;A (GMS)</td>
<td></td>
<td>Government</td>
<td>1,488.89</td>
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#### Budget Period 2

<table>
<thead>
<tr>
<th>Line</th>
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<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>10</td>
<td>International Consultants</td>
<td></td>
<td>Government</td>
<td>18,000.00</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Travel</td>
<td></td>
<td>Government</td>
<td>4,000.00</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Training, Workshops and Conference</td>
<td></td>
<td>Government</td>
<td>15,800.00</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>F&amp;A (GMS)</td>
<td></td>
<td>Government</td>
<td>3,024.07</td>
<td></td>
</tr>
</tbody>
</table>

### Activity ID | Description                  | Budgets By Period | Total Budget |
| ACTIVITY2     | Youth Employment Policies     | 9,844.00          | 19,075.00    |

#### Budget Period 1

<table>
<thead>
<tr>
<th>Line</th>
<th>Budget Item</th>
<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>72400</td>
<td>Communication &amp; AV Equipment</td>
<td>Government</td>
<td>9,114.81</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>75100</td>
<td>F&amp;A (GMS)</td>
<td>Government</td>
<td>729.19</td>
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</tr>
</tbody>
</table>

#### Budget Period 2

<table>
<thead>
<tr>
<th>Line</th>
<th>Budget Item</th>
<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>73300</td>
<td>Rental &amp; Maint of IT Equipment</td>
<td>Government</td>
<td>8,547.22</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>75100</td>
<td>F&amp;A (GMS)</td>
<td>Government</td>
<td>683.78</td>
<td></td>
</tr>
</tbody>
</table>

### Activity ID | Description                  | Budgets By Period | Total Budget |
| ACTIVITY3     | Interactive Youth Portal      | 10,000.00         | 20,000.00    |

#### Budget Period 1

<table>
<thead>
<tr>
<th>Line</th>
<th>Budget Item</th>
<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>72100</td>
<td>Contractual Service-Companies</td>
<td>Government</td>
<td>9,269.26</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>75100</td>
<td>F&amp;A (GMS)</td>
<td>Government</td>
<td>740.74</td>
<td></td>
</tr>
</tbody>
</table>

#### Budget Period 2

<table>
<thead>
<tr>
<th>Line</th>
<th>Budget Item</th>
<th>Budget Item Description</th>
<th>Resource Type</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>72100</td>
<td>Contractual Service-Companies</td>
<td>Government</td>
<td>9,269.26</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>75100</td>
<td>F&amp;A (GMS)</td>
<td>Government</td>
<td>740.74</td>
<td></td>
</tr>
</tbody>
</table>
C. Adding Proposal Attachments

UNDP is starting to move to SharePoint for document management. Accordingly; we have integrated SharePoint into Atlas to facilitate the uploading of all Project Documents.

When clicking on the Attachment Tab the SharePoint - Programme Document Center will be available to upload all the supporting documents under the respective country office.

Full Guidance – How to Upload Documents

D. Proposal Maturity (Pipeline Management)

In order to report the Pipeline, the user will need to identify the Maturity in the proposal as per below:
III. Submit Proposal for Approval

**Important Note:** Before submitting the proposal for approval, please make sure that budgets have been entered for the proposal.

Once the Proposal is **submitted** the Page will be updated as per below:
IV. Approval of Project Proposal

Once the Approving Officer receives the Workflow Notification, the link will take him to the below page to Approve the Proposal or Return for Review if there is any missing information or if changes are required. *(Fin_Treasury, Project Manager, Senior Manager, Manager LV1 and LV2 can approve Proposal)*

Note: Return for Review will change back the Proposal Status to Draft and allow project staff to make required modification and update, once Approved no further changed to the Proposal can be made.
V. Setting up Approved Projects

Navigation: Atlas Main Menu > Grants > Project Management > Approved Projects

Project Definitions
Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria
- Business Unit: begins with JOR10
- Short Title: begins with 00106461
- Email ID: begins with
- Department: begins with
- Case Sensitive

Search Results

1. Enter the respective Business Unit and Project ID
2. Click Search

Please note that the Project Setup tabs will be available on this page. We will go through setting the project step by step.

1. Click on the arrow next to Output Details to update the Output and Activity details.
1. Setting up Output and Activity Details: Based on approved PRODOC

1. Make sure that all the information is updated and reflects any changes after the Project Approval stage.

2. Enter the Activity Purpose and Long Description as per the approved PRODOC.

3. Click on Save Project Definition to save the changes.
2. Setting up Output Targets and Results:
Based on PRODOC Result and Resources Framework (RRF)

1. Click on Output Targets and Results Tab.

2. Enter the Output Short and Long Description, Baseline and Indicators based on the PRODOC Result and Resources Framework (RRF)

3. Enter the Output Target and Results (This will be updated on milestone basis)
   * Future Years (i.e., 2019 etc.) will be made available late December or first week of the year.

4. Click on Save.
3. Setting up Project Budget:

Note that this page will reflect only Finalized (KKed) budget; that's why at the initial creation of the project the budget will read Zero.

This section reflects the project:
1. Begin/End Date
2. Budget summary by period
3. Total Resources Required

PS. All the fields can be modified from Project Tab

The Project Revision page will open in a new window

PS. Only Finalized (KKed) budget will be reflected
The Project Revision page will open in a new window.

Once the full COA is completed and saved the budget in detail will be reflected in the project revision page.

Note: The same steps should be followed for all Project Budget Periods. Make sure to Finalize all the budgets once the Gender Attribute is assigned (Step 7 below) to update the Commitment Control.
4. Setting-Up Project General Management Support (GMS):

Please note that once you select the GMS Calculation a new GMS Tab will be available.

3. Click on GMS Tab for setting.

2. Select the GMS calculation option.

<table>
<thead>
<tr>
<th>Regular Resources</th>
<th>0.00</th>
<th>GMS Calculation</th>
<th>Earn As You Go</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Resources</td>
<td>100,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Resources Required</td>
<td>100,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Budget Period Schedule:

<table>
<thead>
<tr>
<th>Budget Period Schedule</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01/06/2018</td>
<td>31/12/2018</td>
</tr>
<tr>
<td>2</td>
<td>01/01/2019</td>
<td>31/12/2019</td>
</tr>
</tbody>
</table>

Output:

<table>
<thead>
<tr>
<th>Output ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00108299</td>
<td>Youth Employment Promotion</td>
</tr>
</tbody>
</table>

* POPP Chapter on GMS
Several enhancements have been introduced in the Project Management Module to improve the data quality and correctness of GMS rates and department income distribution. Changes include the following:

- The GMS rate is captured at the Project-Fund-Donor Level.
- GMS income is calculated at the Project level based on expenses recorded by Donor and Fund.
- GMS rate and distribution for the project should be entered in Atlas. *(only one GMS method per project applies)*
- The GMS calculator has been integrated into Atlas for maximum automation and minimal data entry. The fund code entered will automatically populate the GMS rate percentage based on the current cost recovery policy and minimum rates that therefore apply. Furthermore, the department distribution will also be automatically populated.
- The automation also ensures that GMS income is correctly distributed to the relevant departments.
- Atlas will allow different GMS rates within the same project; in those noted cases where there are multiple donors with different negotiated agreements/rates *(i.e. when a project has a combination of programme country cost sharing and third-party costing sharing)*.

Please note that while the system attempts to automate the process to the maximum extent possible, you need to review all the data and ensure that the correct GMS rates and GMS distribution modality has been selected.

Furthermore, the corresponding project budget entries for each COA (Donor/Fund) combination must be created so that GMS income can be recovered in a timely and accurate manner.

*Note: Make sure to click on  **Save GMS**  after entering all required GMS information.*
5. Setting up Activity Plan Results and Assessment:

On this page you will be able to set the Planned Results, Assessment method and Progress of each Activity under the Project. *(The Activity Plan Results and Assessment is OPTIONAL)*

1. Click on Activities Tab
2. Select Output & Activity; the Purpose & Description will be automatically populated based on the information entered at the Project Tab
3. Enter the Target Date (When will the assessment of quality be performed?)
4. Enter the Activity Planned Results based on the (RFI)
5. Enter the Activity Means of Verification (What method will be used to determine if quality criteria has been met?)
5. Update the progress on the Planned Results on Milestone Basis.
7. Click on Save Activities
6. Project Monitoring:

On this page you will be able capture monitoring actions, corresponding due dates or milestones, and description of the milestone.

Once the Monitoring Action is completed; you will need to check the Completed box which will open new fields to enter the Completion Date and person responsible for completing the action.

Note: Make sure to click on **Save Monitoring** after changing the status of Monitoring Action or adding a new Action.
7. Project Risk Register:

On this page you will be able to update, follow-up and track the Project Risks (Risk Register). Project risks may be raised at any time during the project, by anyone with an interest in the project.

Managing Project Risks will involve:
- Capturing and formally logging the Project Risk
- Determining the type and category of risk and indicating whether it is High or not
- Capture Event, Causes, Impact, Validity, Owner and Treatment(s)
- Complete the Impact and Likelihood to get the Risk Level

In case the identified Risk is High, you will need to check the High box and treatments will need to be updated on regular basis to reflect how this high risk will be addressed and managed.

**Note:** Make sure to click on **Save Risks** after updating a Risk or adding a new Risk.

* All mandatory fields will need to be completed for “All Risks” identified under the project prior to successful addition or update of the Risk Register.

*Click here for ERM Policy*
8. Setting the Outputs Attributes (Gender Marker):

This facility is used to capture attributes relating to an Output. At present, this is being used to capture the Gender Marker for UNDP projects.

Each output must be allocated a gender rating of 0, 1, 2 or 3, as follows:

- Outputs that have gender equality as a principal objective should be rated 3.
- Outputs that have gender equality as a significant objective should be rated 2.
- Outputs that will contribute in some way to gender equality, but not significantly, should be rated 1.
- Outputs that are not expected to contribute noticeably to gender equality should be rated 0.

Note: If the Output Attribute is not assigned; it will not be possible to Finalize the Project Budget and Atlas will give an error.
9. Uploading Attachments:
On this page you will be able to upload all the Project documents such as PRODOC, Financial Reports, Progress Reports, Lessons Learned, Project Extension and any project related document.

10. User Fields:
On this page you will be able to enter User Fields; this is optional and some offices are using it as identification data to filter specific queries that reflect those fields.
11. **Project Overview:**

The “*Project Overview*” is a new function under the Project Management Module that will allow the user to review the health of the project through one view. The view will summarize the following:

- **E. Project Basic Information:** will reflect Project basic information as per Project Tab.
- **F. Project Amount:** This section will reflect the Previous Year (*Based total Utilization as per IPSAS Project Resource Overview Report*), current and future years (*As per Approved and Finalized Budgets in Atlas*).
- **G. Output Details:** will reflect the list of Outputs under the Project.
- **H. Project Donors:** will reflect the Donors under this Project (*As per Approved and Finalized Budgets in Atlas*).
- **I. Risk Count:** will reflect the count of risks and flag the high risk in red (*As per the Risk Tab*).
- **J. Next Monitoring Item:** will reflect all monitoring items that are not marked as completed and will highlight the overdue items with red text (*As per the Monitoring Tab*).
- **K. HACT Monitoring:** will reflect the IA details and the assessment details as per the HACT Tool managed in OFRM SharePoint.
VI. **Portfolio Management**

Portfolios are a collection of projects and/or development services or engagement facilities that contribute to shared results and are managed together for better integration and efficiency. They may contribute to:

- The same outcome or SDG;
- The same targeted groups or geographic area;
- Projects contributing to an output or set of outputs;

This is an optional approach intended to reduce the transaction costs of project designing, monitoring, implementing, overseeing and reporting, as many required functions are done for the portfolio instead of separately for each project.

**Notes:**
1) A project can only be in one portfolio to ensure clear accountability for monitoring, governance and communication with partners.
2) Projects included in a portfolio may have different implementing partners and implementation modalities, such as a mix of projects implemented by UNDP (DIM) and national partners (NIM).

**A) Entering a new Portfolio:**

**Navigation:** Atlas Main Menu > Grants > Project Management > UNDP Portfolio

![Diagram of portfolio creation process]

1. Click "Add a New Value" Tab and enter the respective BU
2. Click Add
3. Enter the Portfolio Title and Description
4. Select the Portfolio Manager
5. Click (±) or (±) to add/remove project
6. Link the Projects to the Portfolio (Note only Approved Projects can be linked)

Click Save
Note: Once you save the Portfolio you will get a unique Portfolio Number populated and new tabs will become available (Overview Tab, Monitoring Tab and Risks Tab).

B) Portfolio Overview Tab:

Click here to go directly to CPS platform and link the Project Outputs to CPI Outputs

Click on Update Button to go to the Project Page and Update the Project Data

All the elements on the Portfolio Overview are read only and they follow the same logic explained in the Project Overview above (See Page 25 of this guide).
C) Portfolio Monitoring Tab:

*Note:* The Monitoring Item is linked to the Project; If the project is deleted from the Portfolio the monitoring item will be deleted from the portfolio Monitoring tab.

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1. Select the Main Project that this item belongs to from the Portfolio Projects

2. Select the Milestone Code

3. Add Due Date, Description and comments (if any)

4. Click Save

5. Click Add New Monitoring highlighted above to add new value or Return to go back

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Click Add New Monitoring to introduce a new Monitoring Item for the portfolio

Click on the Update Logo next to each Monitoring Item to update the details or Mark the item as completed.

Note: The completed Checkbox, Completion Date and Responsibility (i.e. Completed By) will only need to be added when the item is completed.
**D) Portfolio Risks Tab:**

*Note: The Risk is linked to the Project; If the project is deleted from the Portfolio the Risk will be deleted from the Portfolio Risks tab.*